

ADDENDUM TO ALL POSITION DESCRIPTIONS IN REGION 7

POSITION NUMBER: _____ EMPLOYEE: Diane Locascio

POSITION TITLE, SERIES, AND GRADE: Accountant (Leader) GS-510-13

MEDICAL MONITORING PROGRAM REQUIREMENTS

- ☐ This position IS in the medical monitoring program.
☒ This position IS NOT in the medical monitoring program.

Regional Safety & Health Officer Concurrence: [Signature]

- ☐ Compliance with EPA Order 3500.1, Inspector Training Program is required.

DRUG TESTING PROGRAM

- ☐ This position IS in the drug testing program.
☒ This position IS NOT in the drug testing program.

Drug Testing Program Coordinator Concurrence: _____

FLSA EXEMPTION

- ☐ This position is Non-Exempt from FLSA.
☒ This position is Exempt from FLSA.
 ☐ Executive Exemption
 ☐ Administrative Exemption
 ☐ Professional Exemption

BARGAINING UNIT DESIGNATION

- ☒ Position is included in the ☒ NTEU (0029) ☐ AFGE (0011)
☐ Position is eligible for inclusion in a BU but currently not covered (7777).
☐ Position is excluded from the BU (8888).

EXTRAMURAL RESOURCES MANAGEMENT DUTIES

- ☒ This position has NO extramural resources management responsibilities.
☐ Total extramural resources management duties occupy less than 25% of the time and a Position Description (PD) amendment is added to the position description in the form of the Extramural Resources Management Duties Checklist.
☐ Total Extramural Resources Management Duties occupy 25% to 50% of time. These duties are indicated in a PD amendment added to the position description in the form of the Extramural Resources Management Duties Checklist and described in the position description.
☐ Total Extramural Resources Management duties occupy more than 50% of time. These duties are indicated in the PD amendment added to the position description in the form of the Extramural Resources Management Duties Checklist and described in the position description.

PROPERTY MANAGEMENT, PROPERTY ACCOUNTABILITY AND PROPERTY UTILIZATION OF EPA'S REAL AND PERSONAL PROPERTY

- ☒ This position has NO property management, property accountability and property utilization of real and/or personal property responsibilities.
- ☐ This Position is a ☐ Property Management Officer (PMO); ☐ Property Accountability Officer (PAO); ☐ Property Utilization Officer (PUO) and/or ☐ Custodial Officer duties occupy less than 25% of the time and a Position Description (PD) amendment is added to the position description in the form of a Property Management, Property Accountability and Property Utilization Checklist.
- ☐ More than 25% is described in the position description.

ANNUAL CONFIDENTIAL FINANCIAL DISCLOSURE REPORT

- ☐ Required to File
- ☒ Excluded from Filing

Regional Ethics Officer Concurrence: _____

RISK DESIGNATION (Complete the attached Risk Designation Form)

Risk Level: LR Computer-ADP: _____

Minimum Investigation: NACT

Adjustment for Uniqueness and Uniformity: _____

Regional Security Officer: _____

[Signature]
Supervisor Signature

2/4/10
Date

[Signature]
Classification Specialist

2/26/10
Date

Review

(Attached to Original Position Description)
8/09

TRANSMITTAL SLIP

DATE: April 2, 2010

SUBJECT: Transmittal of Position Description

TO: John Phillips, Chief
FMSS

FROM: Tina Palmerin 
Human Resources Specialist

Attached are two copies of the position description for Diane Locascio. The effective date of her appointment was March 14, 2010. One copy is for you to keep and one copy should be provided to Ms. Locascio. If you have any questions about the position description, please give me a call at x7572.

PERFORMANCE STANDARD INFORMATION:

[X] Reassignment/Transfer/New Hires

- employees who are reassigned or new to your office/branch should be under performance standards within 30 days of the effective date of the reassignment/transfer/new hire.

If you have specific questions about the performance management process, please call Mary Parker x7495.

United States Environmental Protection Agency POSITION DESCRIPTION COVERSHEET		1. DUTY LOCATION Kansas City, KS		2. POSITION NUMBER 00064477	
3. CLASSIFICATION ACTION: a. Reference of Series and Date of Standards Used to Classify this Position <i>see remarks</i>					
Official Allocation	b. Title <i>Accountant (Leader)</i>	c. Service <i>GS</i>	d. Series <i>0510</i>	e. Grade <i>13</i>	f. CLC
4. SUPERVISOR'S RECOMMENDATION	Accountant (Leader)	GS	510	13	
5. ORGANIZATIONAL TITLE OF POSITION (if any) Accountant		6. NAME OF EMPLOYEE Diane Locascio			
7. ORGANIZATION (give complete organizational breakdown)					
a. U. S. ENVIRONMENTAL PROTECTION AGENCY		e.			
b. Office Of Policy and Management		f.			
c. Resources and Financial Management Branch		g.			
d. Financial Management Services Section		h. EPAYS Organization Code 90743610			
8. SUPERVISORY/MANAGERIAL DESIGNATION					
<input type="checkbox"/> [S] First or Second level supervisor: An individual who performs supervisory work and managerial responsibilities that require accomplishment of work through combined technical and administrative direction of others and meets the requirements for coverage as described in the General Schedule Supervisory Guide.					
<input type="checkbox"/> [A] An individual (as defined in Section 7103(a)(10) of Title V of the U.S. Code) who is authorized to hire, direct, assign, promote, reward, transfer, lay off, suspend, discipline, or remove one or more employees, or effectively recommend such action. The exercise of this responsibility is not routine or clerical in nature, but requires the consistent exercise of independent judgment.					
<input type="checkbox"/> [M] A manager who directs the work of an organization; is accountable for the success of line or staff programs; monitors, evaluates, and adjusts program activities; and performs the full range of duties outlined in the General Schedule Supervisory Guide. May also include deputies who fully share responsibility for managing the organization or who serve as an alter ego to the manager.					
<input type="checkbox"/> [B] A management official (as defined in Section 7103(a)(11) of Title V of the U.S. Code) who formulates; determines or influences an organization's policies. This means creating, establishing, or prescribing general principles, plans, or courses of action for an organization; or bringing about a course of action for the organization. Management officials must actively participate in shaping the organization's policies not just interpret laws and regulations give resource information or recommendations or serve as experts or highly trained professionals who implement or interpret the organization's policies and plans.					
<input checked="" type="checkbox"/> [T] "Team Leader" This position meets the requirements for coverage under Part II of the Work Leader Grade Evaluation Guide.					
<input type="checkbox"/> [N] None of the above applies. This is a non-supervisory/non-managerial position.					
9. SUPERVISORY CERTIFICATION I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships and that the position is necessary to carry out governmental functions for which I am responsible. The certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.					
a. Typed Name and Title of Immediate Supervisor John L. Phillips, Supervisory Accountant		d. Typed Name and Title of Second-Level Supervisor Carla V.F. Kohler, Comptroller			
b. Signature <i>John L. Phillips</i>	c. Date 2/4/10	e. Signature <i>Carla V.F. Kohler</i>	f. Date 2/5/10		
10. OFFICIAL CLASSIFICATION CERTIFICATION					
a. <input checked="" type="checkbox"/> This position has no promotion potential. <input type="checkbox"/> If position develops as planned and employee progresses satisfactorily, this position has known promotion potential to grade:		b. Fair Labor Standards Act <input type="checkbox"/> Nonexempt <input checked="" type="checkbox"/> Exempt		c. Functional Code none	
d. Bargaining Unit Code 0029	e. Check, if applicable: <input type="checkbox"/> Medical Monitoring Required <input type="checkbox"/> Extramural Resources Management Duties (____ % of time) <input type="checkbox"/> This position is subject to random drug testing (____)		f. Signature <i>James S. Davis</i>		g. Date 2/26/10
11. REMARKS JFPCS, GS-0500 12/00 GS Leader GEG, HRED-5, 6/98					

TEAM LEADER POSITION DESCRIPTION AMENDMENT	
Position Title, Series and Grade: <i>Accountant (Leader) GS-510-13</i>	
Supervisor's Signature: <i>[Signature]</i>	Classifier's Signature: <i>[Signature]</i>

Mark the Team Leader duties that apply to the position being evaluated. Duties 4, 11, 16 and 20 should be carefully evaluated, considering whether the position should be included or excluded from the bargaining unit. At a minimum, Team leaders perform all of the first seven (7*) coaching, facilitating and mentoring duties and a total of fourteen (14) of the twenty (20) duties listed below. Attach supporting documentation as necessary.

- ☒ *1. Ensure that the organization's strategic plan, mission, vision, and values are communicated to the team and integrated into the team's strategies, goals, objectives, work plans and work products and services;
- ☒ *2. Articulate and communicate to the team the assignment, project, problem to be solved, actionable events, milestones, and/or program issues under review, and deadlines and time frames for completion;
- ☒ *3. Coach the team in the selection and application of appropriate problem solving methods and techniques, provide advice on work methods, practices and procedures, and assist the team and/or individual members in identifying the parameters of a viable solution;
- ☒ *4. Lead the team in: identifying, distributing and balancing workload and tasks among employees in accordance with established work flow, skill level and/or occupational specialization; making adjustments to accomplish the workload in accordance with established priorities to ensure timely accomplishment of assigned team tasks; and ensuring that each employee has an integral role in developing the final team product;

<input checked="" type="checkbox"/> Add the following language to <i>include</i> in the bargaining unit	<input type="checkbox"/> Add the following language to <i>exclude</i> from the bargaining unit
Workload distribution and adjustments require little independent judgment on the part of the team leader. Shifts in work-load are discussed and based largely on team consensus, with team members actively participating in the redistribution of work. Where the team is deadlocked or disagrees on workload shifts, the supervisor makes decisions.	Workload distribution and adjustments require regular exercise of independent judgment on the part of the team leader and consideration of relative skill and workload of team members. While workload issues may be discussed in team meetings, the team leader is responsible for making work assignment decisions, rather than the supervisor.

- ☒ *5. Train or arrange for the training of team members in methods and techniques of team building and working in teams to accomplish tasks or projects, and provide or arrange for specific administrative or technical training necessary for accomplishment of individual and team tasks;
- ☒ *6. Monitor and report on the status and progress of work, checking on work in progress and reviewing completed work to see that the supervisor's instructions on work priorities, methods, deadlines and quality have been met;

- ☒ *7. Serve as coach, facilitator and/or negotiator in coordinating team initiatives and in consensus building activities among team members;
- ☒ 8. Maintain program and administrative reference materials, project files and relevant background documents and make available policies, procedures and written instructions from the supervisor; maintain current knowledge to answer questions from team members on procedures, policies, directives, etc.;
- ☒ 9. Prepare reports and maintain records of work accomplishments and administrative information, as required, and coordinate the preparation, presentation and communication of work-related information to the supervisor;
- ☐ 10. Represent the team in dealings with the supervisor or manager for the purpose of obtaining resources (e.g., computer hardware and software, use of overtime or compensatory time), and securing needed information or decisions from supervisor on major work problems and issues that arise;
- ☒ 11. Report to the supervisor periodically on team and individual work accomplishments, problems, progress in mastering tasks and work processes, and individual and team training needs;

<input checked="" type="checkbox"/> Add the following language to <i>include</i> in the bargaining unit	<input type="checkbox"/> Add the following language to <i>exclude</i> from the bargaining unit
Reports reflect accomplishments as compared to established work plans. Training needs are based on Individual Development Plans (IDPs) developed with the supervisor.	Reports on work accomplishments, problems and training needs reflect the team leader's independent judgment based on personal observations as well as work plan data and IDPs developed by employees.

- ☐ 12. Represent the team consensus and convey the team's findings and recommendations in meetings and dealings with other team leaders, program officials, the public and other customers on issues related to or that have an impact on the team's objectives, work products and/or tasks;
- ☐ 13. Estimate and report to the team on progress in meeting established milestones and deadlines for completion of assignments, projects and tasks, and ensure that all team members are aware of and participate in planning for achievement of team goals and objectives;
- ☒ 14. Research, learn and apply a wide range of qualitative and/or quantitative methods to identify, assess, analyze and improve team effectiveness, efficiency and work products;
- ☐ 15. Lead the team in assessing its strengths and weaknesses and provide leadership to the team in exploring alternatives and determining what improvements can be made (e.g., in work methods, processes and procedures);

- ☒ 16. Approve emergency leave for up to three days; eight hours or less for medical appointments; and/or other types of leave as delegated by management;

<input checked="" type="checkbox"/> Add the following language to <i>include</i> in the bargaining unit	<input type="checkbox"/> Add the following language to <i>exclude</i> from the bargaining unit
Also approves short-term annual leave requests (1 or 2 days) when the impact of the request on the team's ability to meet its deadlines is negligible, referring other requests to the supervisor.	Also approves long-term annual leave requests, which require the team leader to exercise independent judgment in assessing the impacts of the request on the team's ability to meet its deadlines.

- ☒ 17. Resolve simple, informal complaints of employees and refer others, such as formal grievances and appeals, to the supervisor or an appropriate management official.
- ☒ 18. Communicate team consensus and recommendations to the supervisor on actions affecting team and individual awards, rewards and recognition;
- ☐ 19. Inform employees of available employee benefits, services and work related activities.
- ☒ 20. Intercede with the supervisor on behalf of the team to inform the supervisor of performance management issues/problems and to recommend/request related actions, such as: assignments, reassignments, promotions, tour of duty changes, peer reviews and performance appraisals.

<input checked="" type="checkbox"/> Add the following language to <i>include</i> in the bargaining unit	<input type="checkbox"/> Add the following language to <i>exclude</i> from the bargaining unit
Information on performance management issues/problems presented by the team leader is based on objective data such as tracking reports or timely completion of milestones and objectives. Recommendations for reassignments, changes in tour of duty are initiated by team members.	Information on performance management issues/problems includes personal observations of team leaders as well as objective data and is presented personally to the supervisor. Recommendations and requests are based on the team leader's independent judgment, rather than reflecting the team's consensus. Team leader is authorized to "initial off" on performance appraisals and hold performance discussions with team members to share feedback from supervisor.

NOTE: All bargaining unit status questions should be referred to the Region 7 Labor Relations Officer in the Human Resources and Organization Branch.

5/18/00

TEAM LEADER PART II EVALUATION STATEMENT

POSITION:	Accountant (Leader) GS-510-13
ORGANIZATION:	PLMG/RFMB/FMSS

✓

I. MEETS DEFINITION OF TEAM LEADER

- ☒ The Team Leader duties are a regular and recurring part of the employee's assignments.
- ☒ Approximately 30 % or more time is spent performing the team leader duties.
- ☒ Leads a team of "GS" two-grade interval work.
- ☒ Usually participates in the work of the team by performing work that is of the same kind & level as the highest level of work accomplished by the team led.

✓

II. TEAM LEADER FUNCTIONS

(Meets all of the first 7 and a total of 14 of the 20 tasks listed.)

✓

III. BASE LEVEL OF WORK LEAD

(Indicate positions on team, including those *excluded from base level by grade and series (using full performance level).

Excluded: Those positions with an extraordinary degree of independence or have personal accomplishments (e.g. persons who grade are based on: a) impact of person on the position; b) recognized as regional, national or international expert; c) has statute in professional; and/or d) in an incumbency only allocated position.

- 1 - Accountant 510-11 (12)
- 1 - Financial Management Specialist 501-9
- 2 - Financial Technician 503-8(9) Career Ladder Full Performance is 9.
- 1 - Financial Technician 503-7
- 1 - Systems Accountant 510-13

This team leader position consistently assists the team through knowledge and application of leadership and team building skills and techniques such as group facilitation, coordination, coaching, problem solving, interpersonal communication, integration of work processes and products, obtaining resources and liaison with the supervisor. The team leader is also accountable for outcomes and results (timely delivery of quality work products and services produced).

BARGAINING UNIT STATUS DETERMINATION

☒

BU

☐

NBU

Based on the above, this position meets the classification criteria for a team leader position and is classified as a:

Lead _____

- ☐ final grade based on team leader duties (1 grade above base level)
☐ grade based on personal work at the same grade as the team leader duties

☒ Accountant (Leader)
graded and titled on basis of non-leader responsibilities

GS - 0510 - 13
Pay Plan, Series and Grade

James E. Buis 3/12/10
Classification Signature Date

ACCOUNTANT

(GS-510-13)

Introduction -

The incumbent of this position serves as Team advisor and trouble-shooter in the Office of Policy and Management, Resources and Financial Management Branch, Financial Management Services Section, Finance Unit. The purpose of this position is to perform duties necessary to develop, implement and maintain a system of Financial Management accounting and reporting and other accounting services in accordance with prescribed Agency policy directives and Federal statutes.

Major Duties -

1. Provides technical advice and assistance on accounting, reporting and decision-making actions in the Region. Participates in both formal and informal conferences, decision-making sessions, planning and policy formulation meetings providing technical advice and recommendations.
2. Assists in the development and implementation of Regional policies and guidelines as prompted by Headquarters and/or Regional need.
3. Makes decisions on developing Management and Accounting System Reports reflecting the status of funds, audit of travel, accounts payable, accounts receivable, miscellaneous expenses and payroll. Conducts detailed studies to improve the accounting and reporting system to study individual financial problems of program offices, and to review the implementation of new or revised procedures impacting national Financial Management activities.
4. Monitors execution of the annual operating plan and expenditure rates, provides status reports on fund utilization.
5. Provides Financial Management advice to grantees, contractors, program managers, and other agencies on status of grant funds, budget constraints and validity of financial actions.
6. Plans and oversees the development and preparation of both internal and external financial management reports. Furnishes timely information regarding financial status and operations.
7. Performs statistical services for operating programs concerning Rind expenditure, financial trends, accuracy of account balances, problem areas and other financial issues. Plans and oversees reviews of internal operations and accounting procedures to insure compliance with internal control requirements for safeguarding the Agency's assets and to determine the effectiveness of established case management practices in accordance with the Federal Managers Financial Integrity Act (FMFIA).
8. Serves as a certifying officer for Region VII and is held accountable for any illegal, improper,

or incorrect payment resulting from any false, inaccurate, or misleading certification.

9. Oversees the Automated Clearing House (ACH) system for program grants including (1) assuming that adequate fiscal controls are present, (2) maintaining liaison with states and the Federal Reserve Bank on draws, (3) evaluating and auditing the frequency and amounts of grantee draws as compared to program expenditure levels, and (4) reporting any discrepancies or significant changes to program managers.

10. Plans and conducts complex studies and analyses of accounting operations and furnishes accounting and financial statements, reports, and other accounting information. Provides management with the impact of financial transactions on program operations.

11. Plans, organizes, and leads in discussions of the professional employees and supporting personnel in accomplishing the work of the team. This includes providing recommendations on planning work to be accomplished by the team and assuming a leadership role in providing professional training to team members.

Factor 1 - Knowledge Required by the Position -

Level 1-8 - 1550 Points

Understanding and ability to apply generally accepted accounting principles, concepts, theories, auditing standards, cost accounting principles and other Financial Management practices. Ability to interpret and apply Agency policies, directives and Federal statutes to the Financial Management System.

Knowledge of maintaining an accounting system which requires advising managers on changing program operations; formatting new reports to satisfy management's information requirements such as the Chief Financial Officers Act (CFO). Creating procedural instructions to gather financial data to satisfy regulatory or legislative changes. Reviewing documents, records, and accounting reports and processes to assure conformance with generally accepted accounting principles, new operating procedures and revised regulations.

Knowledge and skill to serve as an accountant responsible for accounting systems covering operations such as grants, payroll, travel, transportation, supplies, accounts payable and accounts receivable. Participates in decision-making sessions on planning and policy formulation meetings providing technical advice and recommendations on regulatory requirements and financial policies through the interpretation of data and analysis of program operations and monthly reports.

Ability to understand and apply a knowledge of governmental accounting systems which involve the obligation of appropriated funds for programs to maintain an entire accounting program; to integrate improvements to accounting system capabilities; and to solve problems in overall program management and reporting requirements.

Knowledge and skill to develop a plan and oversee reviews of internal operations and accounting procedures to insure compliance with internal control requirements. Ability to identify problem

areas; determine the action required to improve operating program effectiveness, and maintain the integrity of financial information. Advises financial and program managers and other accountants on difficult accounting problems and provides system recommendations to control and report problems in accordance with the Federal Managers Financial Integrity Act (FMFIA).

Knowledge and skill to identify which operating policies and procedures or system aspects should be established or revised; determines the meaning of data contained in reports and statements in order to identify problem areas and to advise managers, and addresses similar broad issues to establish or implement overall system improvements.

Factor 2 - Supervisory Controls -

Level 2-4 - 450 Points

Works under the general supervision of the Chief, Financial Management Services Section. The employee independently plans and carries out the Financial Management Accounting and Reporting activities. The activities are evaluated for conformance with prescribed policy, adequacy of professional judgment, the effect of advice on the overall accounting program, or the effective integration of accounting systems with accounting programs or systems of other agencies or of services within the Agency.

Factor 3 - Guidelines -

Level 3-4 - 450 Points

Guidelines consist of broad policy statements and basic legislation which require interpretation. For example, guidelines include statutes, Treasury Department regulations, Office of Management and Budget (OMB) directives and circulars, Comptroller General Decisions, General Accounting Office (GAO) directives, and EPA Regulations, policies and procedures. Where policy and guidance have not been established, incumbent must establish procedures.

The accountant is recognized as a technical authority in a field of accounting with responsibility for the development of policies, as well as standards and guidelines, for use by other accountants in an agency or in a functional area across Agency lines in order to satisfy new programs and meet legislative intent.

Factor 4 - Complexity -

Level 4-5 - 325 Points

The work performed in this position is highly complex. It involves the providing of a full range of financial management services to the Region by maintaining and controlling a system of accounting and reporting for the expenditure of appropriated funds for such purposes as payroll, travel, supplies, contracts, grants, and other classes of expenditures. Since financial management is dynamic by nature and management has increased its demand for financial information, the employee must continuously plan, review, and expand the existing system to provide these services. The work also involves the analyses and interpretation of accounting/budget data developed in the accounting system. The results of these analyses are incorporated into various reporting mechanisms and submitted to management in a timely manner.

Factor 5 - Scope & Effect -

Level 5-5 - 325 Points

The work of the incumbent is to insure compliance with Federal and Agency rules and regulations governing financial management operations. It also insures the accuracy and reliability of the Region's financial data. The accountant provides expert advice to accountants, program officials and/or other specialists. Proper management and administration is critical to assure that funds are properly controlled and commitments are met.

Factor 6 - Personal Contacts -

Level 6-3 - 60 Points

Personal contacts include all levels of Regional management, EPA Headquarters personnel, other Federal agency personnel, state personnel, and representatives of professional organizations, such as serving on the Advisory Board, Department of Treasury, Financial Management Service.

Factor 7 - Purpose of Contacts -

Level 7-3 - 120 Points

The purpose of the contacts is to interpret laws, regulations, establish procedures, provide guidance and advice, presenting Region VII's position in discussions, and to provide for the exchange of pertinent information. The purpose of the professional organizations, such as the Advisory Board, is to provide input on the efficiency and effectiveness of Financial Management procedures and services government-wide.

Factor 8 - Physical Demands -

Level 8-1 - 5 Points

The work is sedentary.

Factor 9 - Work Environment -

Level 9-1 - 5 Points

Office setting.

**Total Points = 3290
(3155-3600 = GS-13)**